



# Using Polycom® Phones in a Microsoft® Lync® 2010 Environment

## Quick User Guide

For SoundPoint® IP 321/331, 335, 450, 550, 560, and 650, SoundStation® IP 5000 and SoundStation Duo™, VVX® 500 phones, and SpectraLink® 8400 Series handsets running Polycom® UC Software 4.1.0 or later.

Screen display is product-dependent and may differ from those shown in this guide. See your system administrator for more information. **To learn more, consult your product Quick User Guide and User Guide available from the [Support Web page](#).**

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### About Your Phone

You can find instructions on how to use your phone in the appropriate Quick User Guide on the Polycom [Support Web page](#):

- SoundPoint IP [321/331](#), [335](#), [450](#), [550](#), [560](#), and [650](#)
- SoundStation IP [5000](#) and SoundStation [Duo](#)
- VVX [500](#)
- SpectraLink [8400](#) Series

This guide describes how your phone functions in a Microsoft Lync environment and details only the differences in behavior due to the presence of Microsoft Lync Server 2010.



#### Web Info: Using the Calendaring Feature

If you want to use the Calendaring feature on SpectraLink 8400 Series handsets and VVX 500 and 1500 phones, read the appropriate user guide: [SpectraLink 8400 Series Wireless Handset User Guide](#), or [VVX 500 Phone User Guide](#).

### Microsoft Lync Presence Icons

The following tables show the Microsoft Lync presence icons that display on Polycom phones.

**Table 1: Presence Icons on SoundPoint IP and SoundStation IP Phones**

Icons	Description
	Available
	Busy, Do Not Disturb, In a Call
	Away, Be Right Back, Inactive
	Offline, Unknown

**Table 2: Presence Icons on VVX Phones and SpectraLink 8400 Series Handsets**

Icons	Description
	Available
	Busy, In a Call
	Away, Be Right Back, Inactive
	Do Not Disturb
	Offline
	Unknown

### Phone Features

Microsoft Lync enables you to use all Polycom UCS telephony features, presence, and IM. Sign into your Lync-enabled phone with your sign-in address, user name and password. Once you are signed in, you can:

- Answer, place, and end calls
- Hold and resume calls
- Transfer calls
- Set up conference calls
- Forward incoming calls
- Access voicemail
- Set your presence status
- Manage your Lync contacts
- Send and receive instant messages



#### Tip: When to Press the More Soft Key

If you see a **More** soft key in the rightmost soft key position, press it to display additional soft keys.

You may need to press the **More** soft key to display the **SignIn**, **SignOut**, **Contacts**, and **Add** soft keys.



#### Note: Lync-hosted Conference Calls Not Supported

You cannot initiate, split, or end a Lync-hosted conference call on your Polycom phone.

### Signing Into Microsoft Lync

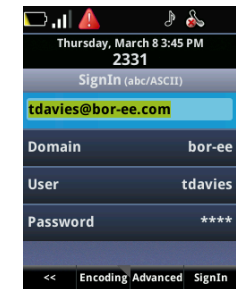
Signing into Lync on your phone enables you to view and place calls to your Lync contacts. The Lync Sign In screen displays the first time your phone connects to the network.

Afterward, you can access the Sign In and Sign Out screens in two ways:

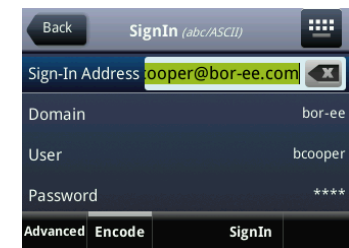
- Press the **SignIn** or **SignOut** soft key.
- Press the **Menu** key and select **Settings > Features > Microsoft Lync > SignIn** or **SignOut**.

The following figures show the Lync Sign In screen on various Polycom phones.

**Figure 1: Signing In on SpectraLink 8400 Series**



**Figure 2: Signing In on VVX 500**



### To sign into Lync:

- Complete the required sign-in fields. Your system administrator will provide you with the correct sign-in address, domain, user name, and password.
- After completing the required fields, press the **SignIn** soft key. If successful, your line will show as registered.

You can now add Lync contacts and see their presence status (see [Updating Your Microsoft Lync Contacts](#)).



#### Note: My Sign-In Credentials Don't Work

If you cannot access your Lync contacts, or you lock your account, see your system administrator.



#### Tip: Using Strong Passwords

Follow your organization's password policy when entering a password for your sign-in credentials. For example, use lowercase and uppercase characters, numbers, and special characters. You can use ASCII, Latin, Katakana, and Cyrillic characters in all passwords on Polycom phones.

On the SoundPoint IP 321, 331, and 335 phones, you can switch to uppercase by pressing the **Up** arrow key and to lowercase by pressing the **Down** arrow key.

### To sign out of Lync:

- Press the **SignOut** soft key.

Once you've signed out, your line shows as unregistered, your presence status is offline, and you will be unable to contact any of your Lync contacts using your phone.



#### Note: Call Lists Deleted When You Sign Out

Once you sign out of Microsoft Lync on your phone, your call lists are deleted.

### Updating Your Microsoft Lync Contacts

You can add, delete, monitor, and call contacts on your Lync contact list.



#### Note: Deleting Lync Contacts From Your Phone

When you delete a Lync contact from your phone, you remove the contact from all instances of your Lync account.

The following figures show the home screen of various Polycom phones displaying Lync contacts:

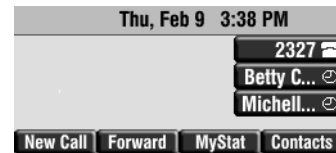
- On this SoundPoint IP 335 phone, Tom is a contact. He is available.

Figure 3: Viewing the Home Screen on SoundPoint IP 335



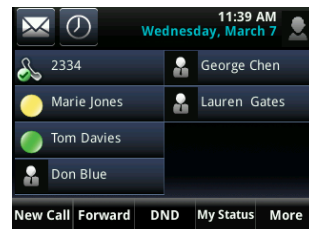
- On this SoundPoint IP 450 phone, Betty and Michelle are contacts. They are both away from their phones.

Figure 4: Viewing the Home Screen on SoundPoint IP 450



- On this VVX 500 phone, Marie and Tom are contacts. Marie may be away from her phones and Tom is available. (Don, George, and Lauren are Favorites/Speed dials.)

Figure 5: Viewing the Home Screen on VVX 500



#### Tip: Lync Contacts on the Home Screen

If you want Lync contacts to display on your phone's Home screen, you must pin them as Frequent Contacts in your Lync client application on your computer. You can still access all your other Lync contacts from your phone by pressing the **Contacts** soft key.

Contacts display alphabetically in your Lync contact list. You can add as many Lync contacts as you like until the maximum number of contacts for your phone is reached, as shown next.

Table 3: Maximum Number of Contacts Permitted

Phones	No. of Contacts
VVX 500 SpectraLink 8400 Series	200
All other phones	100

Your phone will display any groups you create in your Lync client on your computer.

Figure 6: Viewing Groups on VVX 500



#### Note: Groups on Your Phone

You cannot create new groups or delete existing groups on your phone.

You cannot move contacts from one group to another on your phone.

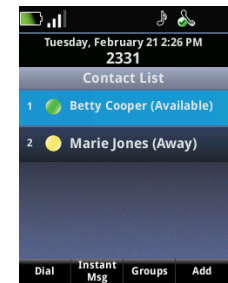
### Adding Contacts to Microsoft Lync

You can manually add contacts to your phone's Lync contact list.

#### To add a Lync contact on your SpectraLink 8400 Series handset:

- Select the **Contacts/Call Lists** icon on the home screen and press **OK**.
- Select **Contacts** and press **OK**.
- Press the **Edit** and **Add** soft keys to add new Lync contacts.
- Enter the contact's user name and press the **Submit** soft key.

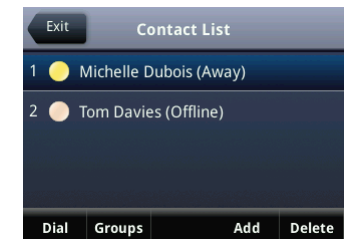
Figure 7: Microsoft Lync Contact List on SpectraLink 8400 Series



#### To add a Lync contact on your VVX 500 phone:

- If available on the Home screen, press the **Contacts** soft key; otherwise press the **Menu** key, and select **Settings > Features > Presence > Contacts**.
- Press the **Add** soft key.
- Enter the contact's user name and press the **Submit** soft key.

Figure 8: Microsoft Lync Contact List on VVX 500



**To add a Lync contact on your SoundPoint IP, SoundStation IP, or VVX 1500 phone:**

- If available on the Home screen, press the **Contacts** soft key; otherwise press the **Menu** key, and select **Features > Presence > Contacts**.
- Press the **Add** soft key.
- Enter the contact's user name and press the **Submit** soft key or **Select** key

The following figure show the Contacts screen on the SoundPoint IP 335 phone.

**Figure 9: Microsoft Lync Contact List on SoundPoint IP 335**



**Note: Your Lync Contact List and Your Phone's Local Contact Directory**

By default, Polycom phones have a local contact directory. The local contact directory is separate from your Lync Contact list. If you add contacts into the local contact directory, they will remain after you sign out and another user signs in. For more information, see [About Your Phone](#) for a link to your phone's Quick User Guide or contact your system administrator.

**Updating Your Microsoft Lync Presence Status**

Presence status indicates your availability to other Microsoft Lync contacts.

**To change your presence status:**

- For most Polycom phones, press the **MyStatus** soft key, or press the **Menu** key and select **Features > Presence > My Status**, and select your desired status.
- On the SpectraLink 8400 Series handsets, press the **Profile** soft key, select **MyStatus**, and select your desired status.

Your new status displays to all users on your contact list. Presence information will also display when you go off-hook or enable Do Not Disturb. Resetting your status changes it back to **Available** or **In a Call** if you are currently in a call.

**Note: Changing Presence Status on Your Phone**  
When you change your presence status on your phone, your status will change on the Microsoft Lync client on your computer as well.

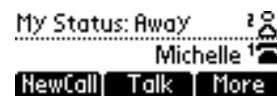
**Note: How Do Not Disturb Status and Use of Do Not Disturb Feature Interact**

When you enable Do Not Disturb on your phone, your Lync presence status automatically changes to *Do Not Disturb*. When you disable Do Not Disturb on your phone, your presence status automatically changes to **Available** or **In a Call**.

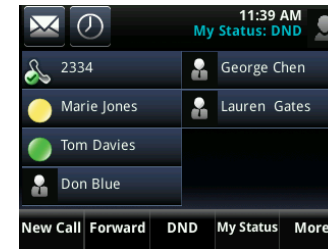
When you update your Lync presence status to *Do Not Disturb*, incoming calls will go to voicemail, and **My Status: Do Not Disturb** will display in the status bar. Updating your status to *Do Not Disturb* does not enable Do Not Disturb on your phone, and the Do Not Disturb icon will not display next to phone lines.

The following figures show different presence statuses on the Home screens of various Polycom phones. [Figure 10](#) shows the presence status of monitored contacts in the Microsoft Lync Contact list.

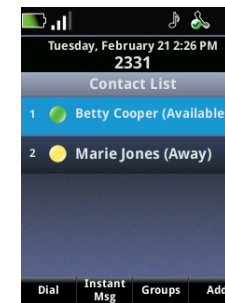
**Figure 10: Away Status on SoundPoint IP 335**



**Figure 11: Do Not Disturb Status on VVX 500**



**Figure 12: Microsoft Lync Contact List on SpectraLink 8400 Series**



**Placing Calls**

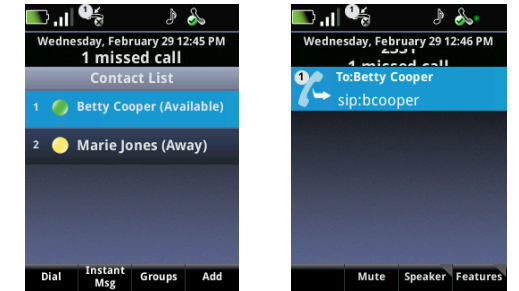
You can place a call in multiple ways, using either the handset, the speakerphone, a headset, the Dial key (available on the SoundPoint IP 321, 331, and 335 only), a line key, or your Microsoft Lync contact list.

- **To place a call** Select the contact you wish to call, and activate your handset, headset, or speakerphone.

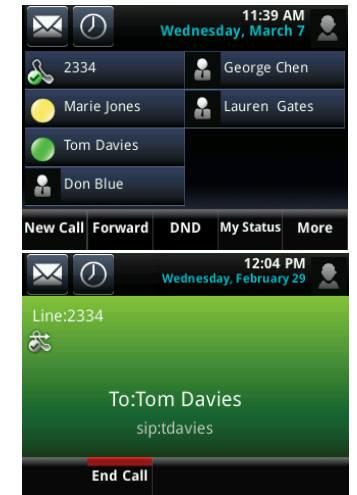
**Note: Video Calls on VVX 1500 Phones**  
You can make video calls between VVX 1500 phones, and between VVX 1500 phones and supported Polycom video endpoints or Microsoft Lync clients. You can use VVX 1500 phones with a Polycom video bridge.

The following figures show how to place a call to a Lync contact from various Polycom phones.

**Figure 13: Placing Calls on SpectraLink 8400 Series**



**Figure 14: Placing Calls on VVX 500**



**Tip: Calling Federated Contacts**

To place calls to other companies or remote contacts, you can use the SIP URI option. For more information, see the appropriate User Guide.

If network issues delay your call, one of the following messages displays:

- ‘Sufficient bandwidth is not available. Please try the call again later.’
- ‘Call delayed’
- ‘Call may take longer to connect.’

If you make an emergency call, the message ‘This is an emergency call’ displays during the entire call.

### Answering Calls

When you answer an incoming call, the call becomes active. All incoming calls display on your phone’s screen.

The following figures show incoming calls on various Polycom phones.

Figure 15: Answering Calls on SpectraLink 8400 Series

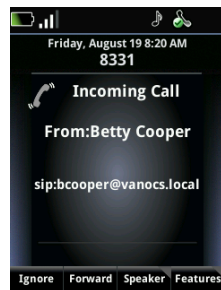
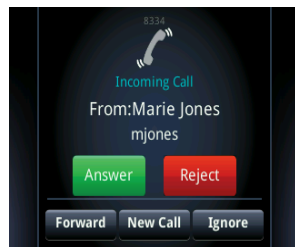


Figure 16: Answering Calls on VVX 500

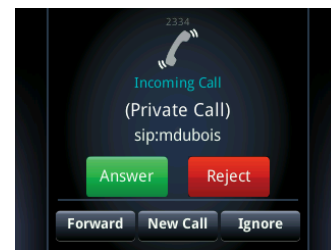


- **To answer an incoming call** Lift the handset, press the speakerphone button, or use your headset.

- **To answer an incoming call while in an active call** When you receive another call while you are already in an active call, you will hear a beeping tone, which indicates that a call is waiting. An incoming call prompt also displays, identifying the incoming caller and enabling you to ignore, answer, or reject the call by pressing the appropriate soft key.

If your system administrator has given you a private number, you can give this number to others so they can contact you directly. The following figure shows an incoming call on a private line.

Figure 17: Answering Private Calls on VVX 500



### Forwarding Calls

You can forward your phone’s incoming calls to another Lync contact or to your voicemail.

If you select **Forward to a Contact**, enter the user name or number of the Lync contact to whom you wish to direct all incoming calls. A scrolling message displays on your phone, reminding you that you have forwarded all incoming calls to someone else.

The following figures show the *Forwarding Type Select* screen on various Polycom phones, where you can select and configure the automatic call forwarding feature.

Figure 18: Configuring Automatic Call Forwarding on SpectraLink 8400 Series

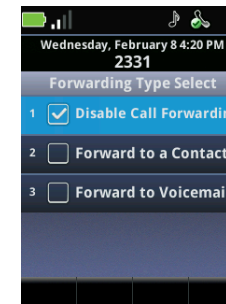


Figure 19: Configuring Automatic Call Forwarding on SoundPoint IP 335



### Sending and Receiving Instant Messages

You can send and receive instant messages on only the SpectraLink 8400 Series handsets. For complete instructions, see the [SpectraLink 8400 Series Wireless Handsets User Guide](#).